7.13 SEPARATIONS - ACADEMIC (SEPR)

Overview

The procedures described in this section are for separating an employee from UCSC employment for one of the following reasons:

AA - To accept another job
AB - To look for another job
AC - Self employment
AD - Dissatisfied with job
AE - Pregnancy, did not desire leave
AF - Family and/or health care
AG - Health
AH - To attend school
AI - Military Service
AJ - Failed to return from leave
AK - Other
AL - Resignation – accept job at newly created health corporation (Same Desk Rule)
AM - Resignation – moved out of area
AN - Resignation – no reason given
BA - Grant/contract expired
BB - Appointment/contract appt expired
BC - Visa/work authorization expired
CA - Indefinite layoff with rehire/recall rights
CB - Termination of limited employee
CC - Termination of other casual employee (on call)
CD - Termination of casual restricted employee
CE - Graduation/no longer enrolled as a student
CF - Per diem release
CG - Indefinite layoff with severance
CH - Indefinite layoff with reduced severance and rehire/recall rights
CI - Indefinite layoff with no severance or rehire/recall rights
CL - Layoff – accept job at newly created health corporation (Same Desk Rule)
DA - Released during -probationary period
EA - Lack of performance
EB - Misconduct
EC - Quit without notice
ED - Job abandonment
EE - Never started employment
EF - No longer certified or licensed
EG - Do not rehire – settlement (employee agrees not to return)
GA - Medical separation
I4 - Inactive for 4 consecutive months
JA - Change to emeritus status
KA - Death
LA - Other – termination (coaches, management program) or separation (per diem nurses, vocational nurses)
RA - Retirement – regular
RD - Retirement – compulsory for SMG and regents' officers
RF - Retirement – faculty

Note: Intercampus Transfers must be processed by the Payroll Office. See *Section 4.6, Intercampus Transfers* for more information.

Policy Summary

A separation action occurs when an employee separates from university employment.

Refer to the *Campus Academic Personnel/Procedures Manual* for specific guidelines.

BEFORE YOU START

1. Obtain required approval to perform the payroll/personnel action.
2. Have the employee complete the following forms:
   - Letter of resignation (voluntary separations)
   - Unemployment Insurance Termination Report (form U5602)

     Be sure the employee completes side two and signs the report.

     Do not complete the report for "without salary" employees (unless they previously held a paid appointment with the University).
3. Provide employee with Termination Benefits packet.
4. Prepare the Data Collection Document - Separation.

Data Entry

Enter data for the separation via the SEPR bundle. This bundle contains the following functions:

ESEP (Separation Data)

EAPP (Appointments/Distributions)

ELVE (Leave of Absence)

EADD (Employee Address)

EPD1 (Employee Personal Data 1)

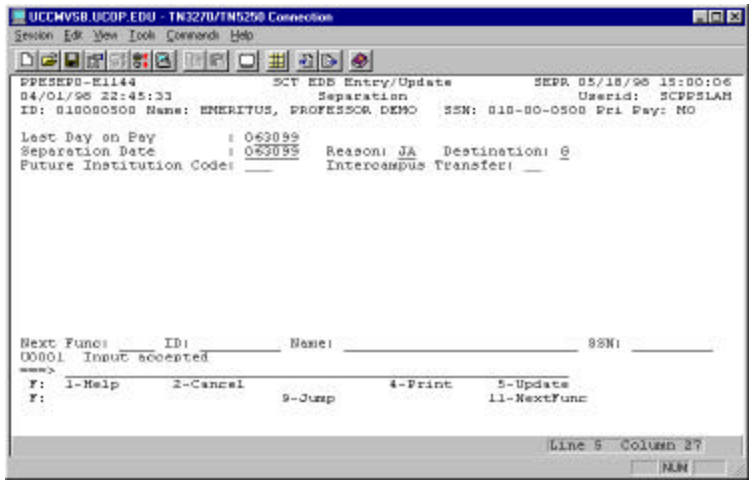
Accessing SEPR

1. Log on to the Payroll/Personnel System.
2. At the Next Func field, type **EEDB** and press **Enter**.
3. Type **BUND** and press **Enter**
4. Type **SEPR** and the **employee ID number**, then press **Enter**

The ESEP function displays the selected employee.

Completing the ESEP Function

THE ESEP SEPARATION FUNCTION


UCCMVSB.UCOP.EDU - TN3270/TN5250 Connection
Session Edit View Tools Commands Help
PPESEP0-E1144 SCT EDB Entry/Update SEPR 05/18/96 15:00:06
04/01/96 22:45:33 Separation Userid: SCPPSLAM
ID: 010000500 Name: EMERITUS, PROFESSOR DEMO SSN: 010-00-0500 Pri Pay: NO
Last Day on Pay : 063099
Separation Date : 063099 Reason: JA Destination: G
Future Institution Code: ___ Intercampus Transfer: __
Next Func: ____ ID: _____ Name: _____ SSN: _____
00001 Input accepted
===>
F: 1-Help 2-Cancel 4-Print 5-Update
F: 9-Jump 11-NextFunc
Line 5 Column 27
NUM

ESEP Notes and Tips

- The Separation Date is usually the same as the Last Day on Pay. For an employee who is on a leave of absence without pay and decides not to return, the separation date is the date the employee notified the department of their decision.
- If title accrues Vacation the Service Center must take the appropriate action to pay it.
- If title accrues sick leave, note sick leave balance from Time and Attendance Record and enter in Terminal Sick Leave Balance field for calculation of service credit.

The ESEP Procedure

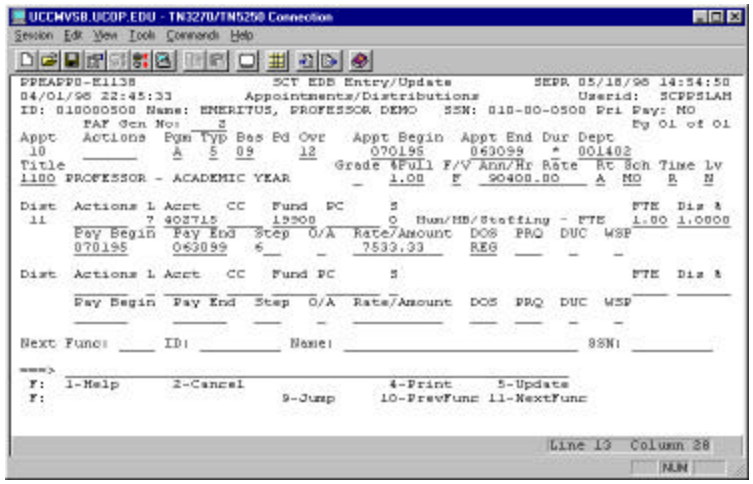
1. Enter data in the following fields as applicable:

Last Day on Pay	The last day the employee will receive compensation in the format: MMDDYY.
Separation Date	The date upon which the separation is effective, in the format: MMDDYY.
Reason	Code indicating the reason for separation. Refer to *Overview* at the beginning of this section, or press F1 Help to see valid codes.
Destination	Code indicating the employee's destination following employment with the University. Press F1 Help to see valid codes.
Future Institution Code	Code indicating the institution the employee will be affiliated with for future employment. Press F1 Help to see valid codes.

2. Press **Enter** to invoke range/value edits.
3. Press **F11 Next Func** to continue to the next function.

Completing the EAPP Function

THE EAPP (APPOINTMENTS/DISTRIBUTIONS) FUNCTION


UCCMVSB.UCOP.EDU - TN3270/TN5250 Connection
Session Edit View Tools Commands Help
PPEAPPO-E1138 SCT EDB Entry/Update SEPR 05/18/96 14:54:50
04/01/96 22:45:33 Appointments/Distributions Userid: SCPPSLAM
ID: 010000500 Name: EMERITUS, PROFESSOR DEMO SSN: 010-00-0500 Pri Pay: NO
PAF Gen No: 3 Pg 01 of 01
Appt Actions Pgm Typ Bas Pd Ovr Appt Begin Appt End Dur Dept
10 A 5 09 12 070196 063099 * 001402
Title Grade %Full F/V Ann/Hr Rate Rt Sch Time Lv
1180 PROFESSOR - ACADEMIC YEAR 1.00 F 90400.80 A MO B N
Dist Actions L Acct CC Fund PC S FTE Dis %
11 7 402715 15500 0 Num/HD/Staffing - FTE 1.00 1.0000
Pay Begin Pay End Step O/A Rate/Amount DOS PRO DUC WSP
070195 063099 6 7533.33 REG
Dist Actions L Acct CC Fund PC S FTE Dis %
Pay Begin Pay End Step O/A Rate/Amount DOS PRO DUC WSP
Next Func: ID: Name: SSN:
===>
F: 1-Help 2-Cancel 4-Print 5-Update
F: 9-Jump 10-PrevFunc 11-NextFunc
Line 13 Column 28
NUM

EAPP Notes and Tips

- All appointments and distributions must be ended on or before the separation date.
- If this is a retirement action for a Senate Member, do not add the Emeritus appointment until the following day and refer to *Section 7.15, Emeritus*, for procedures.
- If the employee has future appointments/distributions (i.e., the begin date comes after the date of separation), you can use the Delete Command to cease the future appointments and distributions.

  (See *Section 1.5, User Navigation and Entry/Update Commands*, for instructions on the use of the Delete command.)

The Appointment Level Procedure

1. **Tab** to the current appointment(s).
2. Enter data in the following fields, as applicable:

Actions (Action Code)	Leave Blank. System Derived for a separation.
Appt End	Enter the date on which the separation is effective in the format: MMDDYY.
Dur	Enter an asterisk (*) to delete data in this field, if applicable.

The Distribution Level Procedure

1. **Tab** or **F15 NewLine** to the current distribution(s).
2. Enter data in the following fields, as applicable:

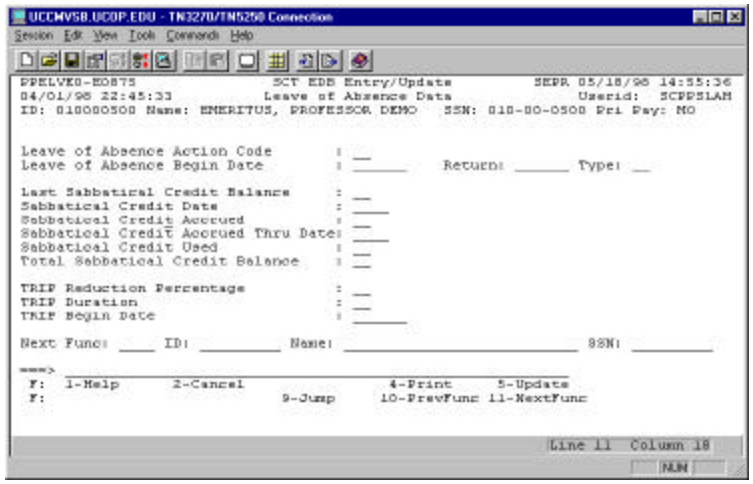
Actions (Action Code)	There is no required action code at the distribution level.
Pay End	Enter the date on which the separation is effective in the format: MMDDYY.

3. Press **Enter** to invoke range/value edits.
4. Press **F11** to continue to the next function.

The **ELVE** (Leave of Absence Data) function will be displayed.

Completing the ELVE Screen

THE ELVE (LEAVE OF ABSENCE DATA) FUNCTION


UCCMVSB.UCOP.EDU - TN3270/TN5250 Connection
Session Edit View Tools Commands Help
PPELVE0-E0875 SCT EDB Entry/Update SEPR 05/18/96 14:55:36
04/01/96 22:45:33 Leave of Absence Data Userid: SCPPSLAM
ID: 010000500 Name: EMERITUS, PROFESSOR DEMO SSN: 010-00-0500 Pri Pay: NO
Leave of Absence Action Code : __
Leave of Absence Begin Date : _____ Return: _____ Type: __
Last Sabbatical Credit Balance : __
Sabbatical Credit Date : ____
Sabbatical Credit Accrued : __
Sabbatical Credit Accrued Thru Date: ____
Sabbatical Credit Used : __
Total Sabbatical Credit Balance : __
TRIP Reduction Percentage : __
TRIP Duration : __
TRIP Begin Date : _____
Next Func: ___ ID: _____ Name: _____ SSN: _____
===>
F: 1-Help 2-Cancel 4-Print 5-Update
F: 9-Jump 10-PrevFunc 11-NextFunc
Line 11 Column 18
NUM

ELVE Notes and Tips

- If an employee is on a leave of absence and the return date is after the separation date, then you should change the return date to match the separation date.
- If the return date is before the separation date and the employee will return before separating, then take no action.
- If the return date is before the separation date, but the employee will not return prior to separation, then extend the leave of absence to the point of separation.

The ELVE Procedure

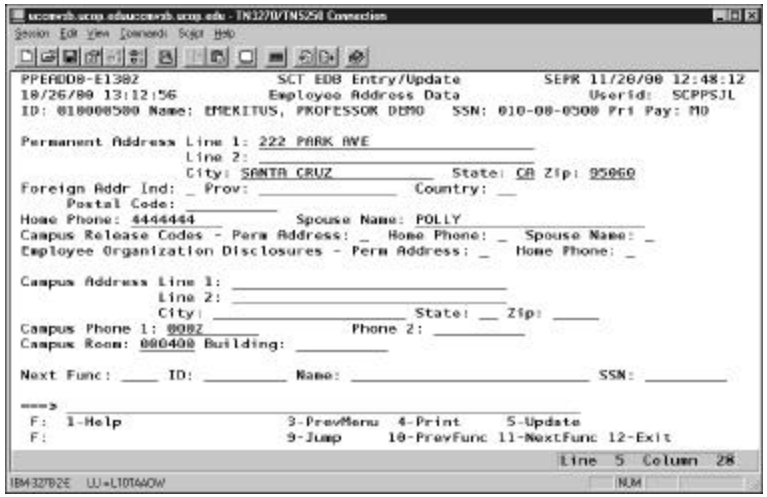
1. Enter data in the following fields, as applicable:

Leave of Absence Begin Date	Should be no change to existing leave of absence begin date.
Return Date from LOA	Enter the appropriate return date. See *ELVE Notes and Tips*.

2. Press **Enter** to invoke range/value edits.

Completing the EADD Function

THE EADD (EMPLOYEE ADDRESS) FUNCTION


PPEADD8-E1382 SCT EDB Entry/Update SEPR 11/20/00 12:48:12
10/26/00 13:12:56 Employee Address Data Userid: SCPPSJL
ID: 010000580 Name: EMEKITUS, PROFESSOR DEMO SSN: 010-00-0500 Pri Pay: M0
Permanent Address Line 1: 222 PARK AVE
Line 2:
City: SANTA CRUZ State: CA Zip: 95060
Foreign Addr Ind: _ Prov: Country: __
Postal Code:
Home Phone: 4444444 Spouse Name: POLLY
Campus Release Codes - Perm Address: _ Home Phone: _ Spouse Name: _
Employee Organization Disclosures - Perm Address: _ Home Phone: _
Campus Address Line 1:
Line 2:
City: State: __ Zip:
Campus Phone 1: 0002 Phone 2:
Campus Room: 000400 Building:
Next Func: ___ ID: Name: SSN:
F: 1-Help 3-PrevMenu 4-Print 5-Update
F: 9-Jump 10-PrevFunc 11-NextFunc 12-Exit
Line 5 Column 28

Notes and Tips

- Make changes to this function *only* if the employee indicates a change of address.

The EADD Procedure

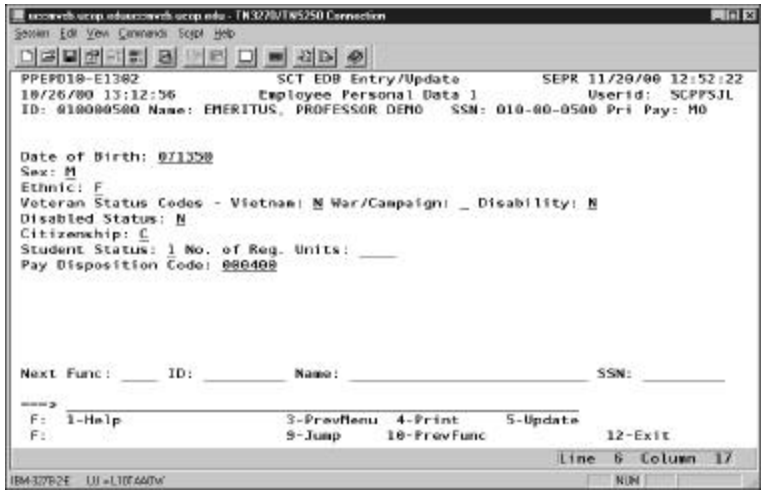
1. Enter data in the following fields, as applicable:

Permanent Address	**Line 1**: First line of the address to which all university mail may be sent (e.g., benefits statement, tax information.) Maximum 30 characters.
Permanent Address	**Line 2**: Automatic continuation of address Line 1, if the first line of the address is exceptionally long (e.g., use for apartment numbers, building names, etc.) Maximum 30 characters. **City**: City portion of the address. US and foreign addresses. Max 21 characters. **State**: State portion of the address. United States addresses only. **Zip**: Zip code associated with the address. United States addresses only.
Foreign Address	**Ind**. Enter **F** if this is a foreign address. **Prov**. Foreign addresses only. Province associated with the address, if applicable. Maximum 30 characters. **Cntry**. Foreign address only. Two-digit country code associated with the address. Press F1 Help to see valid codes. **Postal Code**. Foreign addresses only. Postal code associated with the address.

2. Press **Enter** to invoke range/value edits.
3. Press **F11 Next Func** to proceed to the next function.

Completing the EPD1 Function

EPD1 (EMPLOYEE PERSONAL DATA 1) FUNCTION


PPEPD10-E1302 SCT EDB Entry/Update SEPR 11/20/00 12:52:22
10/26/00 13:12:56 Employee Personal Data 1 Userid: SCPPSJL
ID: 010000500 Name: EMERITUS, PROFESSOR DEMO SSN: 010-00-0500 Pri Pay: M0
Date of Birth: 071350
Sex: M
Ethnic: F
Veteran Status Codes - Vietnam: N War/Campaign: _ Disability: N
Disabled Status: N
Citizenship: C
Student Status: 1 No. of Reg. Units: ____
Pay Disposition Code: 000400
Next Func: ____ ID: _____ Name: _____ SSN: _____
F: 1-Help 3-PrevMenu 4-Print 5-Update
F: 9-Jump 10-PrevFunc 12-Exit
Line 6 Column 17

The EPD1 function allows you to change the check disposition address. (If there are no changes, proceed to *Review*.)

Pay Disposition Code	Enter Mail Code (See *Appendix J, Mail Codes*). Used to deliver checks and surepay stubs.

1. Press **Enter** to invoke range/value edits.
2. This is the last function of the SEPR bundle. Proceed to *Review*.

Review

Use **F10 Prev Func** and **F11 Next Func** to navigate through the SEPR bundle.

1. Make sure you have completed all the required data elements in the bundle.
2. Review all entered data for accuracy and consistency.

Updating the Employee Database

Press **F5 Update** to invoke consistency edits and to display the PAN Subsystem Notification Preparation screen.

Consistency Edit Errors

If there are consistency edits, the Consistency Edit (ECON) screen is automatically displayed. Review all error messages and make necessary corrections.

How to Correct Consistency Errors

From the ECON screen you may:

- Correct errors directly on the ECON screen.
- **F3 Return** to the bundle, make any corrections, then do one of the following:
    - Press **F5 Update** to invoke PAN.
    - Press **F2 Cancel** twice to cancel the update.

See *Consistency Edit Messages (ECON)* in *Section 1.6, System Messages* in this manual for more information and instructions.

PAN Preparation

After pressing **F5 Update** from a data entry screen (if there are no consistency edits) or an ECON screen, you are automatically positioned at the PAN **Comments Entry** screen. From here you can add comments and additional reviewers to the PAN.

1. Add a description of the action and any significant details in the **Comments Entry** screen.
2. Press **F10 NotfPrep** to display the **Notification Preparation** screen, where you can add reviewers as desired.
3. Press **F11 Detail** to display the **Activity Review** screen, where you can review the notification before sending it.
4. Press **F5 Update** to complete the update and send the notification.

If the update is successful, the first function in the bundle appears and displays:

U0007 UPDATE PROCESS COMPLETE

For more information about PANs and additional PAN features, please refer to *Section 1.8, Post Authorization Notification (PAN)*.

Accessing IMSG

1. To access the Message Report Screen go to the **Next Function** field, type **IMSG** and press **Enter**.
2. When the IMSG screen is displayed, review any remaining messages and take the appropriate action.

Disposition of Forms

- Forward the appropriate approval document to the mandatory reviewer.
- Refer to the Separation Data Collection Document for disposition of forms information.